

It's worth your time and attention to really think through the details, time, manpower, budget, back office systems, and web interface you need to create a dynamic year-end campaign.

### **1. Campaign?**

Are you going to create a true campaign? A campaign has a series of steps. It has a sequence. All the steps build on each other. It's not a one-shot appeal. One study I read last year said you could raise an additional 14% by sending a followup letter after your first major solicitation letter. Worth a try to send a followup, or two or three, huh?

### **2. Communications channels?**

What types of communications media will you use? Will you use mail, email, postcards, and/or phone calls and in what order? Direct mail guru Mal Warwick recommends that nonprofits send several appeals via letter, email and phone. All the appeals reinforce each other. That's what gets your busy, distracted donors' attention – repeated cheerful requests.

### **3. Schedule?**

What's the schedule of appeals? When will you send out mail, vs phone calls, vs. email? Try highlighting key dates in your year-end campaign on a big wall calendar. What will follow what? How much time will elapse between appeals? Schedule them out over the next two or three months and make a real plan. Don't forget to plan a couple of email appeals the last week of the year.

### **4. Theme?**

What will be your theme? You need a "dynamite marketing concept" for the appeals, says Mal Warwick. It's an image, a look, or a story. For example, you could use the theme of a hummingbird throughout your campaign. Or a tennis shoe. Your theme should be an image that tells a visual story about your organization. Don't vary the theme once you create it. And, plan for the visual look of both email and letters to be the same. The font/typeface/white space/logo/layout of your annual appeal needs to be the same in email and direct mail. And the message is the SAME.

### **5. Budget?**

What's your budget for the campaign? How far can you stretch your dollars? How much will it cost to print everything? Can you thank your donors this well and this thoroughly? Some gurus recommend eliminating a fundraising brochure with the letter. (Jerry Panas) They think it's more personal if you simply write a really good personal letter, because the brochure feels more anonymous and too slick. Can you save money by eliminating the brochure? Spend the money you save on a professional fundraising writer! Can you consider an additional appeal outside your budget if it will more than pay for itself – and generate a significant boost to your bottom line?

(over)

## **6. “Offer?”**

I’ve struggled with the idea of an “offer” in fundraising. But it’s what the brilliant direct mail copywriters all talk about. The fundraising “offer” is — the thing you are asking the donors to fund.

- Are you going to ask donors to fund “general unrestricted?” (boring and very very difficult).
- Or will it be for something specific that donors can really latch on to? (much more interesting)

Kivi Leroux Miller recommends that we focus on raising money for a specific project in our end of year appeals. That’s what grabs a donor’s attention!

## **7. Segments?**

How will you segment your list? You probably should pull off a certain group for face to face calls. (Yes!) If you start now, you can design a message that will resonate with your donors. Will you send a special set of appeals to nondonors vs donors? How will you solicit lapsed donors? Or last year’s gala attendees? Or mothers of school age children? Or former board members? Consider all the ways you can segment your list and make a plan now.

## **8. Your Board Members?**

What role will your board members play? Will they make some face to face calls with staff? Will they make thank you phone calls? Will they hold holiday parties asking for in-kind gifts? Will they send email appeals to their own networks? Be sure you activate them!

## **9. Thank yous?**

How will you promptly thank your donors? Will you find 7 ways to thank your donors so they’ll give again when asked? Will you organize a team of board members to make prompt thank you calls when gifts are received?

## **10. Evaluation?**

How will you evaluate your campaign? Will you compare your results to last year’s as a % increase? Will you evaluate the average size of gift or the number of gifts or both? Don't forget to build some key face-to-face visits into your year-end plan. Will you measure your renewal rate? Lapsed donors? (some pundits say this is your MOST important indicator.) How will you measure your success?

## **Bottom Line:**

You CAN raise a ton of money at year-end . . . but you can do it only with a carefully thought-out plan.